



## ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

**1A**      **Isabela Beyonce Sanchez (GUARD/P)**  
**Atty**      Jones, Julie C. (for Lidia Sanchez – Petitioner)  
**Atty**      Aguirre, L. Kim (for Sylvia Sanchez – Guardian – Objector)

**Case No. 10CEPR00156**

**Petition for Appointment of Guardian of the Person (Prob. C. 1510)**

See petition for details.			<b>NEEDS/PROBLEMS/ COMMENTS:</b>  <u>Note:</u> Page B is the corresponding Petition for Termination of Guardianship.  <u>Note:</u> See Minute Order of 3/4/15 for visitation orders.
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	W	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
✓	Objections		
	Video Receipt		
✓	CI/DSS Reports		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 4/9/15
			Updates:
			Recommendation:
			File 1A – Sanchez

**1A**

Case No. 10CEPR00156

			See petition for details.	<b>NEEDS/PROBLEMS/ COMMENTS:</b>  1. Need notice to maternal grandparents and all other known relatives pursuant to Probate Code §1460(b)(5).
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W		
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.	W		
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI/DSS Reports			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
				Reviewed by: skc
				Reviewed on: 4/9/15
				Updates:
				Recommendation:
				File 1B – Sanchez

<b>DOD: 8/24/2008</b>		<b>VICTORIA PUMAREJO</b> , daughter and Executor, is Petitioner.		<b>NEEDS/PROBLEMS/COMMENTS:</b>	
				<b>Note Re Estate Valuation:</b> Paragraph 7 of the <i>First Account</i> states that Petitioner's good faith estimate of the value of the real property in the estate at the beginning of the account period is <b>\$145,000.00</b> . <i>Schedule 1</i> states that Petitioner bases the valuation of the estate real property on her estimated value as stated in her initial <i>Petition for Probate</i> filed 7/14/2010. However, while Petitioner acknowledges that the <i>Final Inventory and Appraisal</i> filed 11/5/2014 values the property at <b>\$175,000.00</b> , it appears improper to disregard the Probate Referee valuation of the asset. Petitioner goes on to state that her current opinion of the value as of the date of Decedent's death in 2008 is <b>\$90,000.00</b> , only slightly higher than the value of <b>\$80,000.00</b> stated in the <i>Reappraisal for Sale</i> filed 12/9/2014. <i>Schedule 1</i> shows that Petitioner is improperly disregarding the Probate Referee valuation of the asset (contained in both of the filed appraisals) and is placing an arbitrary estimated value on the asset to use as the basis for the accounting. For purposes of statutory fee calculation under Probate Code § 10800(b), it should be noted that loss on sale of real property (here, <b>\$95,800.00</b> ) should be calculated using the originally appraised (date of death) value (here, <b>\$175,000.00</b> ), and not the reappraisal value.	
<b>Cont. from</b>		<b>Account period: 8/24/2008 – 2/27/2015</b>			
<input type="checkbox"/>	Aff.Sub.Wit.	Accounting	-	<b>[\$146,000.00?]</b>	
<input type="checkbox"/>	Verified	Beginning POH	-	<b>[\$146,000.00?]</b>	
<input checked="" type="checkbox"/>	Inventory	Ending POH	-	<b>\$51,334.57</b>	
<input checked="" type="checkbox"/>	PTC			(all cash)	
<input checked="" type="checkbox"/>	Not.Cred.	<b>Petitioner states:</b>			
	Notice of Hrg	<ul style="list-style-type: none"> <li>This <i>First Account</i> is filed pursuant to the Court's <i>Minute Order</i> of 12/10/2014, providing that if a <i>First Account</i> were on file by 3/2/2015, no appearance would be necessary at the status hearing on 3/4/2015;</li> <li>Petitioner also notifies the Court that she intends to file a <i>Request for Approval of First Account and for Partial Distribution</i>, based on escrow on sale of the real property (the only valuable asset) having closed on 2/20/2015;</li> <li>Petitioner believes there will be Form 1041 and 541 information returns to file for the estate for 2015, which cannot be filed until 2016;</li> <li>Petitioner anticipates having to keep the estate open until 2016, but hopes before that time to seek appropriate Court approval to make full distribution to the devisees, and possibly to also seek approval of a Final Account and Distribution.</li> </ul>			
	Aff.Mail				
	Aff.Pub.				
<input checked="" type="checkbox"/>	Sp.Ntc.				
	Pers.Serv.				
	Conf. Screen				
	Letters	090710			
	Duties/S				
	Objections				
	Video Receipt				
	CI Report				
	9202				
	Order	X			
		<b>Petitioner as Executor will request that the <i>First Account of Executor</i> be settled, allowed and approved as filed at such time as Executor seeks Court approval for partial distribution.</b>			
	Aff. Posting				
	Status Rpt				
	UCCJEA				
	Citation				
	FTB Notice				
<b>~Please see additional page~</b>					
<b>Reviewed by:</b> LEG					
<b>Reviewed on:</b> 4/10/15					
<b>Updates:</b>					
<b>Recommendation:</b>					
<b>File 2 – Maestas</b>					

**NEEDS/PROBLEMS/COMMENTS, continued:**

1. Need *Notice of Hearing of the First Account of Victoria Pumarejo*, and proof of mailed service of 15 days' notice prior to hearing pursuant to Probate Code §§ 1220, 11000 and 11601 for the following persons:
  - Isabel Fira Hernandez, daughter;
  - Eduvijen Fira, son;
  - Ruby Sanchez Lopez, daughter;
  - Barbara Garcia Cortez, daughter;
  - Luciano Lara, son;
  - Carmelita Lara, daughter.
2. *First Account* refers to Decedent's household furnishings having dropped in value since the time of seeking appointment as Executor. However, the *First Account* should not address Decedent's household furnishings as they were not inventoried nor appraised as part of the Decedent's estate and, based upon Petitioner's statements that this personal property has no net sale value, they should not be included as part of Petitioner's account.
3. *First Account* states that Petitioner believes there will be Form 1041 and 541 information returns to file for the estate for 2015, which cannot be filed until 2016, and that Petitioner anticipates having to keep the estate open until 2016. The exact nature and purpose of the Form 1041 and 541 information returns for this estate is unspecified by the Petitioner. It appears unnecessary that this estate should remain open for the filing of information returns, unless there is some clarification Petitioner can provide that forms the basis for the necessity of the estate remaining open for Form 1041 and 541 information return filing.
4. *First Account* does not contain a statement regarding whether notice has been sent to the Franchise Tax Board as required pursuant to Probate Code 9202(c)(1) for estates in which *Letters* were issued 7/1/2008 or after, and Court records contain no proof of service of such notice. Need proof of service of notice to the Franchise Tax Board pursuant to Probate Code 9202(c)(1).
5. Need proposed order pursuant to Local Rule 7.1.1(F). (*Note: Despite that this First Account does not request distribution or other relief, a proposed order should be submitted finding that the Court accepts this First Account of the Petitioner.*)

**Note:** Court will set a status hearing as follows:

- **Thursday, October 29, 2015 at 9:00 a.m. in Dept. 303** for the filing of the Second and Final Account and petition for final distribution.

Pursuant Local Rule 7.5, if the document noted above is filed 10 days prior to the dates listed, the hearing will be taken off calendar and no appearance will be required.

### First Account and Report of Administrator

<b>DOD: 7/29/2010</b>		<b>FRANK HINE</b> , brother and Administrator, is Petitioner.		<b>NEEDS/PROBLEMS/COMMENTS:</b>	
				<p><b>Note:</b> Summary of Account lists the beginning property on hand as <b>\$155,250.00</b>. However, the beginning property on hand should be the value of <b>\$134,500.00</b> stated on the <i>Final Inventory and Appraisal</i> filed 6/6/2012. Further, <i>Schedule B, Gain on Sale</i>, does not but should reflect the <b>\$33,500.00</b> gain on sale rather than "none" so as to accurately reflect the values given and the transactions made during the account period.</p> <p>6. Need proposed order pursuant to Local Rule 7.1.1(F). (Note: Despite that this First Account and Report of Administrator does not request distribution or other relief, a proposed order should be submitted finding that the Court settles this First Account and Report.)</p> <p><b>Note:</b> Court will set a status hearing as follows:</p> <ul style="list-style-type: none"> <li><b>Thursday, October 29, 2015 at 9:00 a.m. in Dept. 303</b> for the filing of the Second and Final Account and petition for final distribution.</li> </ul> <p>Pursuant Local Rule 7.5, if the document noted above is filed 10 days prior to the dates listed, the hearing will be taken off calendar and no appearance will be required.</p>	
<b>Cont. from</b>					
	<b>Aff.Sub.Wit.</b>				
✓	<b>Verified</b>				
✓	<b>Inventory</b>				
✓	<b>PTC</b>				
✓	<b>Not.Cred.</b>				
✓	<b>Notice of Hrg</b>				
✓	<b>Aff.Mail</b>	W / O			
	<b>Aff.Pub.</b>				
	<b>Sp.Ntc.</b>				
	<b>Pers.Serv.</b>				
	<b>Conf. Screen</b>				
	<b>Letters</b>	050113			
	<b>Duties/Supp</b>				
	<b>Objections</b>				
	<b>Video Receipt</b>				
	<b>CI Report</b>				
	<b>9202</b>				
	<b>Order</b>	X			
	<b>Aff. Posting</b>				
	<b>Status Rpt</b>				
	<b>UCCJEA</b>				
	<b>Citation</b>				
	<b>FTB Notice</b>	N / A			

<b>DOD: 3-31-12</b>		<b>GREGORY TAYLOR</b> , Executor with Full IAEA without bond, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u><b>OFF CALENDAR</b></u>  <b>[Sixth] Amended Waiver of Accounting and Petition for Final Distribution filed 4/13/15 is set for hearing 5/14/15.</b>  <b>Note to Judge:</b> Executor resides in Maryland.  <b>Minute Order 2-18-15:</b> Any additional proof to support the position that there is no trust or trust property may be filed. Mr. Armas requests 60 days.  Because a Sixth Amended Petition has been filed, this hearing was taken off calendar.  The following issues remain noted for reference:  <u><b>SEE ADDITIONAL PAGES</b></u>
		Accounting is waived.	
<b>Cont. from 021815</b>		<b>[Second]</b> Amended I&A filed 1-15-15: \$278,817.29 (cash)	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	POH: \$278,817.29 (cash)	
<input checked="" type="checkbox"/>	<b>Verified</b>	Executor (Statutory): Waived	
<input checked="" type="checkbox"/>	<b>Inventory</b>	Attorney (Statutory): \$8,576.35	
<input checked="" type="checkbox"/>	<b>PTC</b>	<b>Petitioner states</b> he is the sole heir of the Mason family upon the death of the Administrator Joseph Mason and has waived accounting and statutory fees.	
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>	<b>See also Declaration of Attorney Armas filed 10-15-14 and Declaration of Gregory Taylor filed 1-15-15.</b>	
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	Petitioner states the decedent and her spouse (now deceased) signed a trust that Mr. Armas had prepared for them. The trust provides for a distribution identical to the distribution set forth in the decedent's will.	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	Although the trust was prepared and signed, no assets were transferred to the trust. Therefore, there are no trust assets. The distribution in this matter should therefore be pursuant to Article Fifth of the decedent's will.	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>	11-9-12	
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input checked="" type="checkbox"/>	<b>FTB Notice</b>	<b>Petitioner requests distribution as follows:</b> Christopher Taylor: \$10,000.00 Jeffrey Taylor: \$5,000.00 Nicole Taylor: \$5,000.00 Gregory Taylor, Sr.: \$250,240.94	

## Page 2 - NEEDS/PROBLEMS/COMMENTS:

1. **The Court may require further clarification regarding what, exactly, the cash sum indicated on the Second Amended Inventory and Appraisal represents.**

**Background:** The first I&A filed 11-2-12 included \$204,522.95 in six separate investment accounts, plus real property valued at \$300,000.00. The I&A did not state whether the assets were the separate property or community property assets of the decedent; however, it was later noted that the same real property was also inventoried as an asset of the Estate of Joseph Mason in 14CEPR00064, along with one of the accounts listed.

An amended I&A filed 10-15-14 indicated cash of \$277,794.06, which also happened to be the amount of property on hand, with a footnote as follows: *"The above sum represents separate property of Juanita Mason. There is an additional \$277,794.06 that is assigned to the Estate of Joseph Mason as his community property interest and not subject to distribution by this estate."*

(It is unclear to the Examiner what that statement means, but it appears to indicate that there was community property between the couple, but unclear what assets were in that category.)

This second amended I&A filed 1-15-15 indicates cash of \$278,817.29, with a footnote as follows: *"The above sum represents separate property of Juanita Mason."*

As noted on previous Examiner Notes, this simple cash sum does not appear to be an accurate representation of this decedent's assets as of the date of death. Petitioner explains in his declaration that all accounts were consolidated into one account, and some things like property taxes were paid from the account. However, even with that information, the I&A should still reflect the date of death assets and total, which was originally listed as six separate accounts totaling \$204,522.95, and the property on hand (POH) would be the consolidated lump sum at present.

**Note:** The attorney's statutory compensation should be based on the I&A date of death value, and if gains are used in calculation, detailed schedules of such gains must be included pursuant to Cal. Rule of Court 7.705(b). Here, the attorney is requesting compensation based on the new value, which is the POH, but no schedules are provided, and it is unclear if this sum originated as the six accounts noted on the original I&A.

**Additional note:** In addition to the house, which has since been removed from this estate, it was also noted that one of the original accounts listed (Golden 1) was also listed as an asset of the decedent's husband's estate. Need clarification: Does the amended value include that amount?

**SEE ADDITIONAL PAGES**



**Page 3 - NEEDS/PROBLEMS/COMMENTS (Continued):**

2. As previously noted, the decedent's will distributes her estate to the Mason Family Trust of 2004. Petitioner states that the trust was never funded; therefore, distribution should be made directly to heirs pursuant to Article Fifth of the decedent's will. Examiner Notes previously noted that the trust did appear to have been funded by the execution of Schedule A Transfer of Assets; therefore, distribution should be made to the Trust pursuant to Article Third of the Will, and a declaration pursuant to Local Rule 7.12.5 is needed.

Attorney Armas continues to request distribution directly to the heirs; however, no authority is provided.

Examiner notes also that Article Fifth of the will does not appear to distribute directly to the heirs as requested; rather, it appears to create a testamentary trust based on the 2004 trust.

3. Proposed order does not appear to include distribution of the residue. Need revised order based on clarification of the above noted issues and the Court's order thereon.

**Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution**

		<b>TERRI DENISE GILL</b> , daughter, was appointed Executor with full IAEA authority without bond on 02/13/2013.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Letters issued 02/19/2013. Minute Order of 02/13/13 set this matter for hearing.	
<b>Cont. from 041814, 082214, 102314, 120414</b>		Inventory & Appraisal Partial #1 filed 07/12/13: <b>\$77,240.00</b>	<b>Note: Page B is the Status Hearing on the Settlement Agreement.</b>
		Inventory & Appraisal Partial #2 filed 07/12/13: <b>\$40,024.41</b>	
<b>Aff.Sub.Wit.</b>		Inventory & Appraisal Final filed 07/12/13: <b>\$19,813.34</b>	<b>Status Report filed 4/6/15 states a Stipulation for Settlement is circulating and should be filed before the hearing.</b>
<b>Verified</b>			
<b>Inventory</b>		<b>Status Report filed 03/10/14</b> Petitioner and Robert Hanggi, through their respective attorneys, have been in negotiations to settle the estate. As of the date of this Status Report no agreement has been made. The last offer to settle was made by Petitioner's attorneys on 12/12/2013. Mr. Pape has advised that Robert Hanggi recently had surgery and was unavailable to review the settlement proposal. Petitioner intends to file a Petition under Probate Code §850, and have the court determine the separate property and the community property interest that the Decedent owned at the time of death. Once these issues are resolved petitioner will prepare and file a Petition for Final Distribution of the Estate.	<b>1. Need First Account or Petition for Final Distribution.</b>
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>		<b>Former Report of Status of Administration filed 08/18/14</b> states Petitioner filed an 850 Petition seeking to have the tentative property settlement that decedent and her husband, Robert H. Hanggi, had negotiated before the death of the decedent confirmed. Petitioner has been in negotiations with counsel for Robert H. Hanggi on resolution of this matter. Robert H. Hanggi has filed a Petition for a Probate Homestead over the interest the decedent owned in the real property. The hearing on the 850 Petition and the Petition for a Probate Homestead has been continued to 10/02/2014. Petitioner believes there is a reasonable probability that the matters will be resolved at that time. Petitioner is informed and believes and thereon alleges that the estate may be in a position to close by the end of 2014. The major issue to be resolved is the amount the decedent's estate will receive from Robert Hanggi, for decedent's interest in the residence and reimbursement of the funds for the cattle which he deposited into his own account and the termination of the length of his Probate Homestead.	
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			<b>Reviewed by: LV/skc</b>
<b>Status Rpt</b>			<b>Reviewed on: 4/9/15</b>
<b>UCCJEA</b>			<b>Updates:</b>
<b>Citation</b>			<b>Recommendation:</b>
<b>FTB Notice</b>			<b>File 5A – Hanggi</b>

<b>DOD: 4-14-12</b>		<p><b>TERRI DENISE GILL</b>, Daughter and Executor with Full IAEA without bond, is Petitioner.</p> <p><b>Petitioner states</b> Petitioner filed a petition under Probate Code §850 seeking to confirm the tentative property settlement that the decedent and her husband had negotiated prior to the decedent's death. The 850 Petition sought, inter alia, a determination that the decedent owned a community property interest in the Springville, CA, residence, confirming that the decedent owned a 6.16 acre parcel as her sole and separate property, and confirming ownership of funds in accounts.</p> <p>On 5-2-14, Robert Hanggi filed a homestead petition over the decedent's interest in the Springville residence.</p> <p>Following discussions and negotiation, Petitioner and Robert Hanggi, through their attorneys, have reached a settlement to resolve the 850 petition and the homestead petition. Petitioner believes it is for the advantage, benefit, and best interest of the estate and those interested therein that the stipulation be approved without the necessity of trial. The stipulation is contingent upon approval by this court.</p> <p><b>Petitioner requests an order that the stipulation be confirmed and approved, and that all parties be authorized and directed to perform the stipulation according to its terms and do all acts and execute all documents that may be necessary or proper in the performance of the stipulation and in making its provisions effective.</b></p> <p><b>See Page 2.</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u>Status Report filed 4/6/15 states a Stipulation for Settlement is circulating and should be filed before the hearing.</u></p> <p><b>Note:</b> Upon settlement, a First Account or Petition for Final Distribution is still necessary to formally close the estate. The Court will address the status hearing at Page A of this calendar as appropriate.</p> <ol style="list-style-type: none"> <li>1. The Stipulation is signed by the attorneys only and is not signed by the parties. The Court may require authority, or may require the stipulation to be signed by the Executor and Mr. Hanggi.</li> <li>2. Notice of Hearing was sent to Robert Hanggi "C/O" his attorney, Jeffrey Pape. Direct notice is required pursuant to Probate Code §1214 and Cal. Rule of Court 7.51(a).</li> </ol>
<b>Cont. from 031115</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input type="checkbox"/>	<b>Notice of Hrg</b>		
<input type="checkbox"/>	<b>Aff.Mail</b>		
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b> 2-19-13		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		

**The Stipulation contains the following terms:**

- Robert Hanggi shall pay the estate the sum of \$5,000.00 for the saddle which was owned by the decedent as well as other monetary issues.
- Robert Hanggi is awarded a Probate Homestead in the community property interest which the estate has in the Springville residence for life. Robert Hanggi shall be responsible for repairs, maintenance, utilities, property taxes, and insurance on the residence.
- The license that Robert Hanggi had to use on a road on the Darlene Hanggi property is relinquished and Robert Hanggi at his sole cost and expense will build a new road on his property to access the pond on his property.
- Robert Hanggi relinquishes his license to use a water pipeline that crosses the Darlene Hanggi property, and at his sole cost and expense, will cap the line and identify the location of the capped line so the water line on the Darlene Haggi property can be located.
- The parties will reasonably cooperate with each other to bring water to the Darlene Hanggi property, including, but not limited to, easements required on the Rboert Hanggi property.
- Robert Hanggi at his sole expense will modify an existing water meter, and the estate will install a new water meter in accordance with respective entitlements.
- The parties shall share costs of a survey to determine the property line between the 10 acres owned by Robert Hanggi and the 6 acres owned by Darlene Hanggi.
- Robert Hanggi shall construct a fence, at his cost and expenses, so that cattle shall not enter the property owned by Darlene Hanggi, and shall provide a key to the lock on the gate for the Darlene Hanggi property.

<b>DOD: 10/27/13</b>		<p><b>STEPHAN OHANESIAN and ROBERT OHANESIAN</b>, Co-Administrators with Limited IAEA with bond of \$85,000.00, are Petitioners.</p> <p>I&amp;A #1: \$4,925,000.00 (real property) I&amp;A #2/Final: \$262,989.81 (\$128,776.50 cash plus various securities)</p> <p><b>Petitioners state</b> that based on the values set forth in the Inventory and Appraisals, the Co-Administrators determined that a federal estate tax return should be filed for the decedent's estate. The return was prepared by the Co-Administrators' attorneys and filed 7/11/14. The returns showed no federal estate tax due. The IRS accepted the return as filed and provided the Co-Administrators with an Estate Tax Closing Document on 11/28/14.</p> <p>Approx. 95% of the estate consists of real property in Fresno County being 96 acres of more or less bare ground located at South Peach and South Willow Avenues between California Avenue and Church Street and between Cherry and East Avenues near American Street. There are six beneficiaries who will share equally in the distribution. The Co-Administrators have concluded it would be in the best interest of the estate for the real property to be sold to facilitate distribution.</p> <p>At one of the sites, there is a collection of tar which the Co-Administrators believe was left by the US Army during WWII, or possibly by a brick company that ran a business on the property prior to WWII. The Co-Administrators are in the process of determining the cost and steps necessary to remediate the property such that it can be marketed for sale.</p> <p style="text-align: center;"><b>SEE ADDITIONAL PAGES</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. This petition does not address notice to creditors or notice pursuant to Probate Code §9202(a), (b), and (c).</p> <p><b>Note:</b> The Court will set a status hearing for the filing of the next report or account or petition for final distribution as appropriate.</p>
<input type="checkbox"/> Aff.Sub.Wit.			
✓ Verified			
✓ Inventory			
✓ PTC			
Not.Cred.	X		
✓ Notice of Hrg			
✓ Aff.Mail	W		
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
✓ Letters	1/14/14		
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202	X		
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice	X		

Page 2

**Petitioners state (Continued):** In addition, the Co-Administrators have received unfavorable reassessments from the Fresno County Tax Assessor on the real properties, and have appealed the reassessments by way of filing Applications for Changed Assessment relating to Notices of Supplemental Assessment, and they are awaiting the assignment of a hearing date by the Fresno County Board of Supervisors. The Co-Administrators also stand ready to work directly with the Fresno County Tax Assessor if and when the opportunity presents itself to possibly arrive at a compromise and settlement of the proposed real estate tax assessments associated with the change of ownership occasioned by the decedent's death.

Very recently, the City of Fresno adopted a new general plan affecting, among other things, the real property on Peach Avenue. The plan designated 16 acres more or less out of the Peach Avenue property for park purposes. The Co-Administrators protested the plan as it related to the estate property and were successful in getting the plan modified such that the designation for park purposes covering the estate's property was reduced to 4 or 5 acres. The purpose of opposing such a large number of acres designated as park was in the best interest of the estate because with fewer acres in the designation, the options of a prospective buyer/developer of the real property are enhanced, making the property more marketable.

Besides all the real property included in the I&A, the Administrators presently have in their possession cash of \$53,127.01 held in a checking and money market account for the estate and securities and money market funds held in a brokerage account amounting to \$196,831.72.

**The Co-Administrators pray as follows:**

1. That the statutory period of administration run for a duration of 18 months instead of 12 due to the necessity of filing a federal estate tax return pursuant to §12200 et seq.;
2. That due to unsettled issues relating to the real estate and desired marketing thereof to effect distribution, the Ao-Administrators be granted an additional 6-month period ending in September 2015 in which to either file a Petition for Final Distribution or a Second Report of Status;
3. Any other order or orders as the Court may deem appropriate under the circumstances.

**Note:** All heirs waive the filing of an additional bond in excess of the bond originally obtained (\$85,000.00).

<b>DOD: 10-8-13</b>		<b>PUBLIC ADMINISTRATOR</b> , Successor Administrator, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>Account period: 8-20-14 through 11-7-14</b> Accounting: \$250,917.40 Beginning POH: \$237,605.63 Ending POH: \$194,487.26 (cash)	<b>OFF CALENDAR</b>
<b>Cont. from 031115</b>			
	<b>Aff.Sub.Wit.</b>	<b>Surcharge (Former Administrator): \$39,090.91</b> Petitioner states the former administrator misappropriated \$39,090.91 and should be surcharged that amount. This amount is the difference between the cash listed on the I&A and what the Public Administrator was able to marshal.	<b>Amended First and Final Account filed 4-10-15 is set for hearing on 5-20-15.</b>
✓	<b>Verified</b>		
✓	<b>Inventory</b>	<b>Public Administrator (Statutory): \$8,018.35</b>	<b>Note: Minute Order 3-11-15 provides, in pertinent part, for certain preliminary distributions, and that Ms. Kruthers will file an amendment to the petition regarding the distribution and submit an order re preliminary distribution.</b>
✓	<b>PTC</b>		
✓	<b>Not.Cred.</b>	<b>Attorneys (Statutory): \$8,018.35</b> Petitioner states the Public Administrator's attorney and Gary Bagdasarian, attorney for the former Administrator, have agreed to share statutory compensation as follows: <b>Gary Bagdasarian: \$6,018.35</b> <b>County Counsel: \$2,000.00</b>	<b>Order Allowing Preliminary Distributions was filed 3-16-15.</b>
✓	<b>Notice of Hrg</b>		
✓	<b>Aff.Mail</b>	<b>Public Administrator (Extraordinary): \$1,248.00</b> (\$1,000.00 for the sale of the real property, per local rule, plus \$248.00 for preparation of tax returns)	<b>Update: Mr. Bagdasarian, attorney for Former Administrator Nancy Hamilton, filed a Second Declaration on 4-2-15 requesting credit against her surcharge.</b>
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>	<b>County Counsel (Extraordinary): \$1,170.00</b> (for 7.8 attorney hours @ \$150/hr)	<b>The following issues remain noted for reference:</b>
	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>	<b>Gary Bagdasarian (Extraordinary): \$4,372.50</b> (per declaration, discounted from \$8,745.00, for 31.80 hours @ \$275/hr in connection with the sale of the real property)	<b>SEE ADDITIONAL PAGES</b>
	<b>Letters</b>		
	<b>Duties/Supp</b>	<b>Costs: \$1002.00</b> (Attorney Bagdasarian, for filing, publication, certified copies, appraisal)	<b>Reviewed by: skc</b>
	<b>Objections</b>		
	<b>Video Receipt</b>	<b>Bond fee: \$156.84</b>	<b>Reviewed on: 4-9-15</b>
	<b>CI Report</b>		
	<b>9202</b>	<b>Costs: \$537.00</b> (\$435.00 filing, plus \$102.00 processing)	<b>Updates: 4-13-15</b>
✓	<b>Order</b>		
	<b>Aff. Posting</b>	<b>Closing: \$10,000.00</b> (for any possible outstanding taxes)	<b>Recommendation:</b>
	<b>Status Rpt</b>		
	<b>UCCJEA</b>	<b>Distribution pursuant to intestate succession and assignments: (See #1 and #2)</b> David Morris: \$33,019.72 Diane Wray: \$33,019.71 Nancy Hamilton: \$27,928.79 Inheritance Funding Company (Assignee): \$68,000.00	<b>File 7 - Morris</b>
	<b>Citation</b>		
✓	<b>FTB Notice</b>		

Page 2

## NEEDS/PROBLEMS/COMMENTS:

1. Petitioner calculates distribution from \$161,968.22, which is the POH \$194,487.26 less \$32,519.04 for the requested fees and costs. However, Examiner calculates the total of the requested fees and costs to be \$34,523.04 (a \$2,004.00 difference), which leaves \$159,964.22 for distribution. Need clarification.
2. Petitioner's calculation for payback of the two assignment loans for the two beneficiaries is incorrect. The two beneficiaries' assignments are for different loan amounts, and contain different repayment terms, as follows:

**Per Assignment filed 6-11-14, David Morris borrowed \$15,000** in exchange for a promise to assign \$25,200 from his share. However, the agreement contains a provision that if the loan is paid back within 12 months, the **payoff would be reduced to \$22,400.00**.

**Per Assignment filed 11-5-14, Diane Rogers borrowed \$5,000.00** in exchange for a promise to assign \$8,800.00 from her share. However, the agreement contains a provision that if the loan is paid back within 6 months, the **payoff would be reduced to \$7,800.00**.

**Therefore, need amended petition reflecting corrected distribution, pursuant to #1 and #2 above.**

3. The petition does not address whether notice was required pursuant to Probate Code §9202(b) (Victim Comp).
4. Petitioner states the whereabouts of Former Administrator Nancy Hamilton are unknown; therefore, Notice of Hearing was not given to her. The Court may require a declaration of due diligence.
5. Pursuant to Probate Code §10953, the Court may compel the attorney for the absconded personal representative to file an account. If required, the Court may set a status hearing for the filing of the account.



**Petition for Termination of Proceedings and Discharge of Administrator for Want of Assets Subject to Administration**

<b>DOD: 12/27/13</b>	<b>LISA MARIE TERAN</b> , Administrator, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from</b>	<b>Petitioner states</b> that a probate proceeding was opened so that the personal representative of the estate could participate in pending litigation which has now been completed. No settlement proceeds resulting from the lawsuit are payable to the decedent's estate and there are no assets of the estate subject to administration.	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
✓ <b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
✓ <b>Not.Cred.</b>		
✓ <b>Notice of Hrg</b>		
✓ <b>Aff.Mail</b> w/o		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b> 10/02/14		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
✓ <b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 04/13/15
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 8 – Teran</b>

**Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)**

<b>DOD: 12/17/14</b>		<b>ALENE Y. SOLEY</b> , Surviving Spouse and named Executor without bond, is Petitioner.  Full IAEA – ok  Will dated 7/12/96  Residence: Fresno Publication: Business Journal  Estimated value of estate: Personal property: \$100,000.00 Annual income: \$ 15,000.00 Real property: \$442,000.00 Total: \$557,000.00  Probate Referee: Steven Diebert	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Note:</u> The Court will set status hearings as follows:  <ul style="list-style-type: none"> <li>Wednesday, Sept. 16, 2015 for filing the Inventory and Appraisal</li> <li>Wednesday, July 13, 2016 for filing the first account or petition for final distribution.</li> </ul> If the proper items are on file prior to the status hearing dates pursuant to Local Rule 7.5, the status hearings may come off calendar. Otherwise, written status report is necessary.	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			S/P
<input checked="" type="checkbox"/>	<b>Verified</b>			
<input type="checkbox"/>	<b>Inventory</b>			
<input type="checkbox"/>	<b>PTC</b>			
<input type="checkbox"/>	<b>Not.Cred.</b>			
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>			
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>			w
<input checked="" type="checkbox"/>	<b>Aff.Pub.</b>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>			
<input type="checkbox"/>	<b>Pers.Serv.</b>			
<input type="checkbox"/>	<b>Conf. Screen</b>			
<input checked="" type="checkbox"/>	<b>Letters</b>			
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>			
<input type="checkbox"/>	<b>Objections</b>			
<input type="checkbox"/>	<b>Video Receipt</b>			
<input type="checkbox"/>	<b>CI Report</b>			
<input type="checkbox"/>	<b>9202</b>			
<input checked="" type="checkbox"/>	<b>Order</b>			
<input type="checkbox"/>	<b>Aff. Posting</b>			
<input type="checkbox"/>	<b>Status Rpt</b>			
<input type="checkbox"/>	<b>UCCJEA</b>			
<input type="checkbox"/>	<b>Citation</b>			
<input type="checkbox"/>	<b>FTB Notice</b>			

<b>Reviewed by:</b> skc
<b>Reviewed on:</b> 4/9/15
<b>Updates:</b>
<b>Recommendation:</b> SUBMITTED
<b>File 10 – Soley</b>

**Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)**

<b>DOD: 1/26/15</b>		<b>JANET PARKMAN</b> , Named Alternate Executor without bond, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Named Executor Charles D. Stotts predeceased the decedent.	<b>Note:</b> The Court will set status hearings as follows:
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	S/P	<ul style="list-style-type: none"> <li>Wednesday, Sept. 16, 2015 for filing the Inventory and Appraisal</li> </ul>
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		<ul style="list-style-type: none"> <li>Wednesday, July 13, 2016 for filing the first account or petition for final distribution.</li> </ul>
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		<p>If the proper items are on file prior to the status hearing dates pursuant to Local Rule 7.5, the status hearings may come off calendar. Otherwise, written status report is necessary.</p>
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	w/o	
<input checked="" type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>		
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		<p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 4/9/15</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b> SUBMITTED</p> <p><b>File 11 – Stotts</b></p>

Petition for Appointment of Probate Conservator of the Person and Estate (Prob. C. 1820, 1821, 2680-2682)

Age: 84		<b>TEMPORARY EXPIRES 04/15/15</b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>STEVEN M. BERMAN</b> , son, is Petitioner and requests that the <b>PUBLIC GUARDIAN</b> be appointed Conservator of the Person and Estate without bond.		<b>Court Investigator advised rights on 04/03/15.</b>
<b>Cont. from</b>		<b>Estimated Value of the Estate:</b>		<b>Voting rights affected, need minute order.</b>
	<b>Aff.Sub.Wit.</b>	Personal property - \$1,500,000.00		
✓	<b>Verified</b>	Annual income - 36,000.00		1. Need Letters.
	<b>Inventory</b>	<b>Total - \$1,536,000.00</b>		
	<b>PTC</b>	Real property - \$650,000.00		<b>Note: If the petition is granted status hearings will be set as follows:</b> <ul style="list-style-type: none"> <li>• <b>Wednesday, 08/19/15 at 9:00a.m. in Dept. 303</b> for the filing of the inventory and appraisal <u>and</u></li> <li>• <b>Wednesday, July 20, 2016 at 9:00a.m. in Dept. 303</b> for the filing of the first account and final distribution.</li> </ul> <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter, the status hearing will come off calendar and no appearance will be required.</p>
	<b>Not.Cred.</b>	Voting rights affected.		
✓	<b>Notice of Hrg</b>	<b>Petitioner states</b> the proposed conservatee is unable to care for her physical needs and unable to independently attend to her activities of daily living. Petitioner states that the proposed conservatee's husband recently passed away and shortly thereafter, proposed conservatee's daughter, Sherri Winchester, and her family moved into the proposed conservatee's home. Petitioner states that the proposed conservatee wants Sherri and her family out of her home, but they will not leave. Petitioner states that he believes Sherri is after the proposed conservatee's money and requests that the Public Guardian be appointed in order to protect the proposed conservatee's assets.		
✓	<b>Aff.Mail</b>	w/		
	<b>Aff.Pub.</b>			
	<b>Sp.Ntc.</b>			
✓	<b>Pers.Serv.</b>	w/		
	<b>Conf. Screen</b>	n/a		
	<b>Letters</b>	x		
	<b>Duties/Supp</b>	n/a		
	<b>Objections</b>			
	<b>Video Receipt</b>	n/a		
✓	<b>CI Report</b>			
	<b>9202</b>			
✓	<b>Order</b>			
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
	<b>UCCJEA</b>			
✓	<b>Citation</b>			
	<b>FTB Notice</b>			
				<b>Reviewed by:</b> JF
				<b>Reviewed on:</b> 04/13/15
				<b>Updates:</b>
				<b>Recommendation:</b>
				<b>File 12 – Glaser</b>

<b>Age: 33</b>		<b>ELPIDO GAMEZ and MARIA L. GAMEZ,</b> Co-Conservators, filed their 2 <sup>nd</sup> Account Current on 12/01/14.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need bond in the amount of \$49,232.39
		<b>On 02/25/14,</b> the Court approved the 2 <sup>nd</sup> Account Current and ordered that the conservator's bond be increased to \$49,232.39 and set this hearing for status regarding increased bond.	
<b>Cont. from</b>			
<b>Aff.Sub.Wit.</b>			
<b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			
		<b>Reviewed by:</b> JF	
		<b>Reviewed on:</b> 04/13/15	
		<b>Updates:</b>	
		<b>Recommendation:</b>	
		<b>File 13 – Gamez</b>	

Atty Kruthers, Heather H. (for Public Guardian)  
 Atty Bagdasarian, Gary G. (for Stanley Greenberg and Cheryl Taylor)  
 Atty Amador, Catherine A. (for Nadine Walker and Michele Torres)  
 Atty Helon, Marvin (court appointed for the Conservatee) (previously Joanne Sanoian)

**Probate Status Hearing RE: Filing of the Inventory and Appraisal and Report of the Public Guardian**

	<b>FRESNO COUNTY PUBLIC GUARDIAN</b> was appointed Conservator of the Person and Estate on 12/10/14.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	At the hearing on 12/10/14, the Court ordered all parties to turn over any and all documents requested by the Public Guardian and set a status hearing on 3/11/15 for the filing of an accounting.	
<b>Aff.Sub.Wit.</b>		<p><b>Note:</b> On 3/17/15, Marvin Helon, Court appointed attorney for the Conservatee, filed a Petition for Allowance of Fees and Discharge of Attorney that is set for hearing on 4/28/15.</p> <p>1. Need Inventory and Appraisal for Conservatorship Estate pursuant to Probate Code §2610.</p>
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
	<p>On 3/11/15, the Court set this status hearing for the filing of the Inventory and Appraisal and Report of the Public Guardian. Minute Order states: The Public Guardian's report will include information about the propriety of actions prior to their appointment.</p> <p><b>Status Report Regarding Activity of Trustee filed 4/10/15 states:</b> The Public Guardian was appointed 12/10/14. Attorney Bagdasarian represents Stanley Greenberg and Cheryl Taylor. Stanley Greenberg is the trustee of the Conservatee's trust. On 3/11/15, Ms. Amador stated she recalled that the PG was ordered to file a report of Stanley's handling of trust assets. There was nothing in the minute order about that, but the PG had conducted an informal investigation and found no wrong-doing. The PG offered to provide an informal account to Ms. Amador and the Court regarding her investigation.</p> <p>Deputy Public Guardian Stacy Mauro contacted Stanley on 12/31/14 to request financial information. She received and reviewed the information on 1/9/15 and determined that Stanley had managed and is managing the Conservatee's trust assets for her benefit. See Status Report for Ms. Mauro's narrative.</p>	
<b><u>SEE ADDITIONAL PAGES</u></b>		<p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 4/13/15</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 14 – Greenberg</b></p>

## Page 2

**Status Report (Continued):** On 3/11/15, Ms. Amador sent an email to Senior Deputy County Counsel Heather Kruthers and Ms. Mauro regarding three major areas of concern:

- 1) \$100,000 that was transferred from the conservatee's personal account to the business account;
- 2) Ownership of two parcels of land;
- 3) What happened to cash in the Conservatee's husband's account at his death.

**Ms. Mauro's narratives from 3/20/15 state:** Stan informed that \$100,000.00 was not transferred from Yvette to the business and he has no idea where they (David, Maria and Nadine) are coming up with this. Ms. Mauro asked if Yvette's husband's funds in his bank account went to Yvette. Stan said they can read the will and see where everything went because he did exactly what the will instructed. Stan said he has gone over this with them but they continue to ask the same things. He also said that in mediation last year he provided them with an accounting for the prior three years.

Ms. Kruthers learned from Mr. Bagdasarian that the parties had five mediations last year and Stanley provided answers to all of the children's question. He authorized the dissemination of that information so Ms. Amador and the Court can see what the children have been given and discussed several times. Attached as Exhibit A are Mr. Bagdasarian's correspondence and relevant documents.

It is PG's and County Counsel's belief that David, Nadine and Michele agree that Stanley is the beneficiary of the assets, and they are only questioning his handling trust assets to ensure the use of them for their mother. If that is true, the family should be content that answers have been provided to the PG that have assured the PG that the assets have been and continue to be used for the Conservatee's benefit. In fact, the amount paid to Nadine for caring for the Conservatee has increased at the direction of the PG to Stanley. There was no disagreement from him with the increase for his mother's care. Ms. Mauro has also arranged for the trust to pay for respite care for Nadine.

The PG is satisfied that Stanley, as trustee, is acting in the best interests of the Conservatee and continues to work well with the PG.

## Status Hearing Re: Filing of the Inventory and Appraisal

			<div>NEEDS/PROBLEMS/COMMENTS:</div> <div><u>OFF CALENDAR</u></div> <div>Final I&amp;A filed 4-1-15.</div>
	Aff.Sub.Wit.		
	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 4-9-15
			Updates:
			Recommendation:
			File 16 - Morgan



Atty Garrido-Ross, Emily Erica (pro per – maternal grandmother/Petitioner)  
 Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Malaysia, 13	<b>TEMPORARY EXPIRES 04/15/15</b>		NEEDS/PROBLEMS/ COMMENTS:
Jacob, 11	EMILY ERICA GARRIDO-ROSS, maternal grandmother, is Petitioner.		
Nigeria, 9	Father (Malaysia, Jacob & Nigeria): <b>THEODORO JESUS WILEY RAMIREZ</b>		<u>CONTINUED FROM 03/04/15</u> Minute Order from 03/04/15 states: The petitioner is provided a copy of the examiner notes and directed to cure the defects. The petitioner is ordered not to leave the children alone with mother.
Carlos, 7	Father (Carlos): <b>CLEMENT JOHNSON</b>		
	Mother: <b>CHRISTINA MONIQUE MARQUEZ-SOTO</b> – personally served on 01/05/15; Consent & Waiver of Notice filed 03/23/15		1. Need proof of service at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for:
Cont. from 030415	Paternal grandparents (all): UNKNOWN		
Aff.Sub.Wit.		Maternal grandfather: JESSE MARQUEZ, Sr.	a. Theodoro Jesus Wiley Ramirez (father of Malaysia, Jacob & Nigeria) – personal service required
✓ Verified		Petitioner states [see petition for details]	
Inventory		DSS Social Worker Irma Ramirez filed a report on 02/23/15.	b. Clement Johnson (father of Carlos) – personal service required
PTC		Court Investigator JoAnn Morris filed a report on 03/30/15.	
Not.Cred.			c. Paternal grandparents – service by mail ok
✓ Notice of Hrg			
Aff.Mail	X		d. Jesse Marquez (maternal grandfather) – service by mail ok
Aff.Pub.			
Sp.Ntc.			
✓ Pers.Serv.	w/		
✓ Conf. Screen			
✓ Letters			
✓ Duties/Supp			
Objections			
Video Receipt			
✓ CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
✓ UCCJEA			
Citation			
FTB Notice			

Reviewed by: JF

Reviewed on: 04/09/15

Updates:

Recommendation:

File 21 - Ramirez

**Second Amended Account and Report of Conservator of Estate, Petition for Approval**

<b>DOD: Not provided</b>		<b>CHARLOTTE A. YOUNG</b> , Conservator without bond, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Account period: 5-12-13 through 6-30-14	<b>1. Need Notice of Hearing.</b>  <b>2. Need proof of service of Notice of Hearing at least 15 days prior to the hearing per Probate Code §§ 1460, 1461.5 on:</b> - Office of Veterans Administration  <b>3. There are numerous bank and ATM charges. The Court may require clarification.</b>  <b>4. Need order.</b>
<b>Cont from 010615, 030315</b>		Accounting: \$ 23,376.81	
		Beginning POH: \$ 2.14	
		Ending POH: \$ 748.32	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>	Conservator: \$750.00 (\$50/month)	
<input type="checkbox"/>	<b>Inventory</b>	Petitioner requests an order:	
<input type="checkbox"/>	<b>PTC</b>	1. For settlement and allowance of this account and report and approval and confirmation of the acts of petitioner as conservator;	
<input type="checkbox"/>	<b>Not.Cred.</b>	2. For \$750 as compensation to the conservator for her services to the Conservatee during the period of this account;	
<input type="checkbox"/>	<b>Notice of Hrg</b>	3. For such other orders as the Court deems proper.	
<input type="checkbox"/>	<b>Aff.Mail</b>		
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>2620(c)</b>		
<input type="checkbox"/>	<b>Order</b>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
			<b>Reviewed by:</b> skc
			<b>Reviewed on:</b> 4-9-15
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 22 - Hopkins</b>

**Petition for Appointment of Guardian of the Person (Prob. C. 1510)**

<b>Age: 14</b>		<b><u>TEMPORARY EXPIRES 04/15/15</u></b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		<b>GLORIA DUNN</b> , maternal grandmother, is Petitioner.		<b><u>CONTINUED FROM 02/25/15</u></b>	
		Father: <b>MICHAEL VASQUEZ</b> – served by mail on 01/05/15 with Notice of Hearing only		1. Need proof of service at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for:	
<b>Cont. from 022515</b>		Mother: <b>KOGIAH ETHRIDGE</b> – Consent & Waiver of Notice filed 12/22/14		a. Michael Vasquez (father) – proof of service filed 01/07/15 indicates that Mr. Vasquez was served by mail with a copy of the Notice of Hearing only. Need proof of personal service with a copy of the Petition.	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			b. Paternal grandparents – service by mail sufficient	
<input checked="" type="checkbox"/>	<b>Verified</b>			c. Maternal grandfather – Petition states that Charles Brown is the maternal grandfather; however Declaration of Due Diligence states he is not the maternal grandfather; need clarification	
<input type="checkbox"/>	<b>Inventory</b>			d. Mike Ethridge (brother) and Nyasta Thomas (sister) – proof of service filed 01/07/15 indicates that they were served with Notice of Hearing only. Need proof of service of Notice of Hearing with a copy of the Petition.	
<input type="checkbox"/>	<b>PTC</b>			<b>Note:</b> Proofs of Service were filed 04/06/15 showing service by mail to Greg Bradley and Lupe Collins, however their relationship to the minor is unknown.	
<input type="checkbox"/>	<b>Not.Cred.</b>	Paternal grandparents: UNKNOWN		<b>Reviewed by:</b> JF	
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	Maternal grandfather: CHARLES BROWN – declaration of due diligence filed 04/06/15 states that Charles Brown is not the maternal grandfather		<b>Reviewed on:</b> 04/10/15	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	w/		<b>Updates:</b>	
<input type="checkbox"/>	<b>Aff.Pub.</b>			<b>Recommendation:</b>	
<input type="checkbox"/>	<b>Sp.Ntc.</b>			<b>File 23 - Ethridge</b>	
<input type="checkbox"/>	<b>Pers.Serv.</b>	Siblings: MIKE ETHRIDGE, NYASTA THOMAS – both served by mail on 01/05/15 with Notice of Hearing only			
<input checked="" type="checkbox"/>	<b>Conf. Screen</b>				
<input checked="" type="checkbox"/>	<b>Letters</b>				
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>	<b>Petitioner states</b> [see Petition for details].			
<input type="checkbox"/>	<b>Objections</b>	<b>Court Investigator Charlotte Bien filed a report on 02/06/15.</b>			
<input type="checkbox"/>	<b>Video Receipt</b>				
<input checked="" type="checkbox"/>	<b>CI Report</b>				
<input type="checkbox"/>	<b>9202</b>				
<input checked="" type="checkbox"/>	<b>Order</b>				
<input type="checkbox"/>	<b>Aff. Posting</b>				
<input type="checkbox"/>	<b>Status Rpt</b>				
<input checked="" type="checkbox"/>	<b>UCCJEA</b>				
<input type="checkbox"/>	<b>Citation</b>				
<input type="checkbox"/>	<b>FTB Notice</b>				

**Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)**

<b>Age: 9</b>	<b><u>GENERAL HEARING: 05/26/15</u></b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	<b>JOHN MENDOZA</b> , non-relative, is Petitioner.	<b><u>CONTINUED FROM 04/06/15</u></b> <b>See Page 27B for competing Petition of Maternal grandparents.</b>
	Father: <b>ALOTH PHOMMAVONG</b>	1. Need <i>Notice of Hearing</i> for the temporary hearing. <b>Note:</b> Notice of Hearing filed 04/01/15 for the hearing on 05/26/15
<b>Cont. from 040615</b>	Mother: <b>BRANDY SINAWSKI</b>	2. Need proof of personal service at least 5 court days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Guardian of the Person or Consent &amp; Waiver of Notice or Declaration of Due Diligence</i> for: a. Aloth Phommavong (father) b. Brandy Sinawski (mother)
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Paternal grandparents: NOT LISTED	
<input checked="" type="checkbox"/> <b>Verified</b>	Maternal grandfather: MARK SINAWSKI Maternal grandmother: ANN SINAWSKI	
<input type="checkbox"/> <b>Inventory</b>	<b>Petitioner states</b> that he has been in an on-again/off-again relationship with Breanna's mother since she was a baby and Breanna is like a daughter to him. Petitioner state that the mother is addicted to drugs and is currently homeless. Petitioner states that temporary guardianship is necessary to keep Breanna in school and in a safe and stable environment.	
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>		
<input type="checkbox"/> <b>Notice of Hrg</b>		
<input type="checkbox"/> <b>Aff.Mail</b>		
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input checked="" type="checkbox"/> <b>Conf. Screen</b>		
<input checked="" type="checkbox"/> <b>Letters</b>		
<input checked="" type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input checked="" type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 04/13/15
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 27A – Sinawski</b>

**27A**

Age: 9		<b>GENERAL HEARING: 05/26/15</b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		<b>MARK SINAWSKI</b> and <b>ANNE SINAWSKI</b> , maternal grandparents, are Petitioners.		1. Need <i>Notice of Hearing</i> .  2. Need proof of personal service at least 5 court days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Guardian of the Person</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: a. Aloth Phommavong (father) b. Brandy Sinawski (mother)	
		Father: <b>ALOTH PHOMMAVONG</b>			
		Mother: <b>BRANDY SINAWSKI</b>			
		Paternal grandparents: NOT LISTED			
		Sibling: VANESSA FISCHER			
<b>Cont. from</b>		<b>Petitioners state</b> that Breanna's mother is homeless and an addict and unable to care for Breanna. CPS placed Breanna in their care in 2012, but her mother was able to reunify with her in 2013. Unfortunately, Breanna's mother has gone back to her old ways. Petitioners state that Breanna thrived when she lived with them previously.			
<input type="checkbox"/>	Aff.Sub.Wit.	<input type="checkbox"/>			
✓	Verified	<input type="checkbox"/>			
<input type="checkbox"/>	Inventory	<input type="checkbox"/>			
<input type="checkbox"/>	PTC	<input type="checkbox"/>			
<input type="checkbox"/>	Not.Cred.	<input type="checkbox"/>			
<input type="checkbox"/>	Notice of Hrg	<input checked="" type="checkbox"/>			
<input type="checkbox"/>	Aff.Mail	<input type="checkbox"/>			
<input type="checkbox"/>	Aff.Pub.	<input type="checkbox"/>			
<input type="checkbox"/>	Sp.Ntc.	<input type="checkbox"/>			
<input type="checkbox"/>	Pers.Serv.	<input checked="" type="checkbox"/>			
✓	Conf. Screen	<input type="checkbox"/>			
✓	Letters	<input type="checkbox"/>			
✓	Duties/Supp	<input type="checkbox"/>			
<input type="checkbox"/>	Objections	<input type="checkbox"/>			
<input type="checkbox"/>	Video Receipt	<input type="checkbox"/>			
<input type="checkbox"/>	CI Report	<input type="checkbox"/>			
<input type="checkbox"/>	9202	<input type="checkbox"/>			
✓	Order	<input type="checkbox"/>			
<input type="checkbox"/>	Aff. Posting	<input type="checkbox"/>			
<input type="checkbox"/>	Status Rpt	<input type="checkbox"/>			
✓	UCCJEA	<input type="checkbox"/>			
<input type="checkbox"/>	Citation	<input type="checkbox"/>			
<input type="checkbox"/>	FTB Notice	<input type="checkbox"/>			
				Reviewed by: JF	
				Reviewed on: 04/13/15	
				Updates:	
				Recommendation:	
				File 27B – Sinawski	

**Petition for Appointment of Temporary Conservatorship of the Person and Estate**

	See petition for details.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>Court Investigator advised rights on 3/30/15</p> <p><u>Continued from 4/7/15.</u> Petitioner has now filed consents of family members and proof of service on the proposed Conservatee, as well as a declaration with attachments including bills and a statement regarding selling her mother's home.</p> <p>1. The Court may also require notice to the Fresno County Public Guardian and County Counsel in connection with separate proceedings involving this proposed Conservatee.</p> <p>2. The Court may require bond of \$38,288.80, which includes the Proposed Conservatee's income and the check for \$27,200.00, plus an amount for recovery pursuant to Probate Code §2320(c)(4) and Cal. Rule of Court 7.207, or may require funds blocked pending further consideration.</p>
Cont. from 040715		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	W	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input checked="" type="checkbox"/> Pers.Serv.	W	
<input checked="" type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters	X	
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order	X	
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		<p>Reviewed by: skc</p> <p>Reviewed on: 4/9/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 29 – Conde</p>

			See petition for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Minute Order 4/8/15:</u> The Court orders Ms. Phillips to bring proof of school enrollment to court on 4/15/15.  1. Need proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing on David Phillips (Father) pursuant to Probate Code §2250(e).
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W		
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.	W		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc Reviewed on: 4/8/15 Updates: Recommendation: File 28 – Phillips	